

**TOWN OF WATERFORD
GENERAL FUND
2021-2022 PROPOSED BUDGET**

DEPT/AGENCY:

10104

ASSESSOR

LINE ITEM	DESCRIPTION	2019/2020 ACTUAL EXPENDED	2020/2021 RTM APPROP.	2020/2021 ADDITIONAL/ TRANSFERS	ACTUAL EXPEND & ENCUMB AS OF 1/1/21	2021/2022 DEPT/ AGENCY REQUEST	2021/2022 APPROVED BD/COMM.	Department Request \$ Increase	Department Request % Increase	2021/2022 RECOMMENDED BD OF SELECTMEN	BOS Request \$ Increase
PERSONNEL COSTS											
51110	ADMINISTRATION	201,303	196,788			196,788	196,788	0	0.00%		
51210	CLERICAL/TECHNICAL	62,080	58,818			62,788	62,788	3,970	6.75%		
51810	OVERTIME	32	2,697			0	0	(2,697)	-100.00%		
51910	FRINGE BENEFITS	1,887	0			2,408	2,408	2,408	#DIV/0!		
51920	F.I.C.A	19,402	19,761			20,041	20,041	280	1.42%		
	SUBTOTAL	284,704	278,064	0	0	282,025	282,025	3,961	1.42%	0	0
SERVICES											
52010	ADVERTISING	366	650			400	400	(250)	-38.46%		
52020	POSTAGE	1,364	744			1,031	1,031	287	38.58%		
52030	PROFESSIONAL FEES	478	0			250	250	250	#DIV/0!		
52040	SERVICE CONT & REPAIRS	2,319	1,680			5,666	5,666	3,986	237.26%		
52050	DUES, CONF., & EDUCATION	450	1,825			1,825	1,825	0	0.00%		
52070	REIMBURSABLE EXPENSE	0	0			0	0	0	#DIV/0!	0	
	SUBTOTAL	4,977	4,899	0	0	9,172	9,172	4,273	87.22%	0	0
MATERIALS & SUPPLIES											
53020	OTHER SUPPLIES	57	150			150	150	0	0.00%		
53200	PRICING BOOKS	470	500			500	500	0	0.00%		
	SUBTOTAL	527	650	0	0	650	650	0	0.00%	0	0
DEPARTMENT TOTAL											
		290,208	283,613	0	0	291,847	291,847	8,234	2.90%	0	0

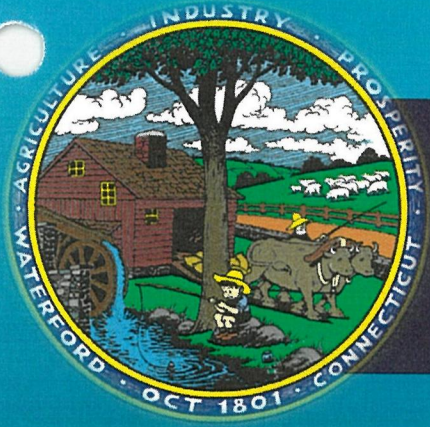
TOWN OF WATERFORD
PERSONNEL WORKSHEET - ASSESSOR
2021/2022 FISCAL YEAR

LINE 51920

DATE OF HIRE	POSITION	HOURS WORKED/ WEEK	HOURLY RATE	SALARY 2020/2021	SALARY 2021/2022	LONGEVITY	TOTAL EMPLOYEE SALARY	PAYROLL TAXES (F.I.C.A)
51110 - ADMINISTRATION								0
9/30/2019	Assessor	40	N/A	98,295	98,295		98,295	7,520
2/15/2019	Asst Assessor	40	N/A	96,326	96,326	2,167	98,493	7,535
							-	184
							-	-
	Total Administration			194,621	194,621	2,167	196,788	15,238
51210 - Clerical /Technical								
4/29/2019	Assessment Aide III							
	AS-G, Step 2	35	22.15	6,647	34,403		34,403	2,632
	43.4 Weeks @ Step 2		0.4984					
	2.25% COLA	35	23.26	33,336	7,164		7,164	548
	8.8 Weeks @ Step 3		0.4748		146		146	11
	FY21 COLA							
10/30/2017	Assessment Aide II							
	AS Non-Union							
	17.4 Weeks @ Step 2.5	19	20.63	6,498	6,974		6,974	534
	2.25% COLA		0.4642					
	34.8 Weeks @ Step 3	19	21.10	13,719	13,951		13,951	1,067
	FY21 COLA		0.4527		150		150	11
	Total Clerical/Technical			60,200	62,788		62,788	4,803
51810 - OVERTIME				0	0		0	0
	TOTALS - DEPARTMENT			254,821	257,409	2,167	259,576	20,041

WORKDAYS
2021/2022 **WEEKS TO BUDGET**
261 52.2

51210 Clerical/Technical Calculations						
Eva Assessment Aide III						
				Hours Worked/Week	Hourly Rate	FY21 Salary Plus Cola
8.8 Weeks @ Step 1 AS-G		35			21.1005	6,645
COLA 2.25%					0.4748	
					21.5753	
43.4 Weeks @ Step 2 AS-G		35			22.1555	33,654
					Total FY 21 Salary	40,299
					Original FY 21 Salary	40,153
					Total Cola Due	146
					FICA	11
Rich Assessment Aide II						
17.4 Weeks @ Step 2		19			20.12	6,801
COLA 2.25%					0.4527	
					20.5727	
34.8 Weeks @ Step 2.5		19			20.63	13,641
					Total FY21 Salary	20,442
					Original FY21 Salary	20,292
					Total Cola Due	150
					FICA	11



Assessment FISCAL YEAR 2022 BUDGET

Town of Waterford

BUDGET FUNCTION

The Assessment Division is responsible for the discovery, listing and equitable valuation of all real and personal property within the Town of Waterford in accordance with Connecticut State Statutes at 70% of fair market value for the annual compilation of the Grand List. Additionally, the assessor and staff administer state and local programs of tax relief, apply exemptions as permitted by state law, assist the public with a variety of inquiries and provide data to various entities including the State Office of Policy and Management.

The Assessor's office also maintains an up-to-date inventory of all property, including land and improvements thereon, changes in ownership, new construction, alterations, parcel and map changes and sub-divisions filed as of the assessment date. All permit activity within the Town of Waterford is inspected and valued annually by Assessment staff and the revaluation of all real property town-wide is conducted once every 5 years as defined by Connecticut State Statutes.

FY2022 BUDGET SUMMARY

Line Item	FY 2020 Appropriated	FY 2021 Appropriated	FY2022 Request	Change from FY 2021 (+/-)	
				\$0	(percent)
PERSONNEL COSTS					
51110 Administration	196,788	196,788	196,788	0	0%
51210 Clerical/Technical	58,818	58,818	62,788	+ 3970	7%
51810 Overtime	0	0	0	0	0%
51910 Fringe Benefits	2,697	2,697	2,408	-289	-11%
51920 FICA	19,761	19,761	20,041	+ 280	1%
SUBTOTAL	278,064	278,064	282,025	+ 3961	1%
SERVICES					
52010 Advertising	650	650	400	-250	-38%
52020 Postage	744	744	1,031	+287	39%
52030 Professional Fees	0	0	250	+250	n/a
52040 Service Cont & Repairs	1,680	1,680	5,666	+3986	237%
52050 Dues, Conf. & Education	1,825	1,825	1,825	0	0%
52070 Reimbursable Expense	0	0	0	0	n/a
SUBTOTAL	4,899	4,899	9,172	+4273	87%
MATERIALS & SUPPLIES					
53020 Other Supplies	150	150	150	0	0%
53200 Pricing Books	500	500	500	0	0%
SUBTOTAL	650	650	650	0	0%
DEPARTMENT TOTAL	283,613	283,613	291,847	+8234	3%

BUDGET EXPLANATIONS BY CATEGORY

Personnel Costs: Office staff consists of 3 full time positions; A Certified Municipal Assessor, an Assistant Assessor and an Assessor's Aide III; and one part-time Assessor's Aide II position at 19 hours/week. Salaries, fringe benefits & longevity are based on rates established by union contracts.

Budget Request: **\$282,025 1% increase**

See the Personnel/Fringe Benefit Spreadsheet for calculations.

Services: Accounts 52010 - 52070: Encompassing all necessary daily operating costs, including statutorily required legal ads and filing notifications, related postage costs, professional fees related to office operations, required office equipment and materials and provisions for Assessor's ongoing continuing education and staff training.

Budget Request: **\$9,172 87% increase**

- **10104-52010 - Advertising** Request: **\$400 -38% reduction**

Includes annual publication of a combined legal advertisement notifying taxpayers of state mandated exemption filing deadlines and announcing Personal Property filing requirements as mandated by state statute. An additional legal ad is published in January announcing the filing requirements for the state Elderly Homeowners/Totally Disabled tax relief program. Required notices are published in *The Day* newspaper and posted on the Town's website. Advertising costs incurred in FY20 = **\$365**; FY21 publishing rate increases are anticipated to be offset by savings realized from cost sharing/advertising jointly with neighboring municipalities.

Advertising Breakdown:

Combined Legal Ad:	\$250
Elderly Legal Ad:	<u>\$150</u>
	\$400

- **10104-52020 - Postage** Request: **\$1,031 39 % increase**

In addition to typical correspondence with taxpayers the Assessor's Office is required by CT State Statute to send out annually the following applications/notifications to taxpayers:

Elderly Homeowners/Totally Disabled Program re-applications and reminder letters

Additional veteran's re-applications and reminder letters

Personal Property and Real Estate increase notices *(under-estimated in FY20,21)

Income & Expense forms for commercial/income producing properties *

*(not included in FY20,21 - I&E forms are required for the upcoming 2022 revaluation and annually thereafter per CGS12-63c)

Postage costs incurred in FY20 = **\$1,364**; FY21 anticipated total cost: **\$1,095** includes greater than typical monthly correspondence total due to Covid-19

Postage Breakdown:

Monthly Correspondence:	\$360	<i>Est. @ \$30/mo</i>
Increase Notices:	\$390	<i>709 @.55</i>
Elderly Applications/reminders	\$ 93	<i>Feb. 150 @.55 + April nonfiler letters 20@.55</i>
Advets reminders	\$ 22	<i>40@.55</i>
Inc. & Expense Forms	<u>\$166</u>	<i>301@.55</i>
	\$1,031	

• **10104-52030 - Professional Fees** Request: **\$250** **increase**

The Assessor's Office requires direct access to the State of Connecticut's DMV CIVLS online database which allows staff members to assist taxpayers with motor vehicle situs issues and accurately determine additions/deletions to the motor vehicle grand list.

Professional Fees incurred in FY20: **\$478** - included new employee background checks, physicals & \$250 DMV CIVLS access. FY21: **\$250** - DMV CIVLS

• **10104-52040 - Service Cont & Repairs** Request: **\$5,666** **237% increase**

The Assessor's office uses administrative software provided by Quality Data Service Inc. (QDS) to apply all exemptions, state and local benefits, produce required state reports and to bridge all billable accounts to the Tax Collector. While software maintenance costs related to QDS are included in the IT budget, there are additional costs attributable to QDS for necessary and required services provided to the Assessor's office. These services include the production and binding of the town's permanent annual Grand List books, and the annual generation and mailing of online personal property filing notices with unique pin # assignment.

The Assessor's Office also leases a Xerox copy machine from Connecticut Business Systems (CBS) at a fixed cost of \$158/month. The previous copy machine did not meet the copying, faxing and scanning needs of the Assessor's office and was replaced in October 2019.

Service Cont Fees incurred FY20: **\$2,319** - cost for previous copier contract total, final cell phone payment for former Assessor. Cost also included QDS production and mailing of personal property declarations which was not budgeted for. QDS GL books fee was incorrectly included & paid from IT budget.

Service Cont. Fees incurred FY21: **\$5,643** - cost for QDS GL books, QDS PP online filing notices and unique pins, copier contract. QDS GL books fee, increased copier fee was not budgeted for.

Service Cont. & Repairs Breakdown:

QDS Grand List Binding:	\$2,700	
QDS Online PP Filing:	\$1,070	<i>Estimated at 1350 accounts</i>
CBS Copier	<u>\$1,896</u>	
	\$5,666	

- **10104-52050 - Dues, Conf. & Education** Request: **\$1,825** **0% increase**

Continuing education, (50 credit hours over 5 years) is required statutorily to meet recertification standards for all Certified Connecticut Municipal Assessors. New staff will require course attendance for training in assessment administration/statutes through educational programs provided by the Connecticut Association of Assessing Officers (CAAO). Courses and workshops are offered in June at the UCONN Assessor School and throughout the year as determined annually by the CAAO's Education Committee. Additional continuing education credits for the Assessor will be received for certain conference attendance on assessment and statute related topics throughout the year. Dues are annually recurring for the CAAO, IAAO, NRAAO and GNLA, all of which require membership as a source of assessment industry tools/information and for educational offerings at a reduced cost. CAAO membership is required to maintain CT CCMA certification.

Dues, Conf. & Education Fees incurred in FY20: **\$450** - Limited educational offerings. UConn Assessor's School cancelled. FY21: **\$575** - courses cancelled/Covid-19

Dues, Conf & Education Breakdown:

Assessor Dues -	\$350
Asst Assr Dues -	\$ 70
Cont. Ed - Assessor & Asst	\$920
UConn/Ed - Assmt Aide	<u>\$485</u>
	\$1,825

- **10104-52070 - Reimbursable Expense** Request: **\$0** **0% increase**

Materials & Supplies: Accounts 53020-53200: Includes additional supplies and materials required to effectively operate the Assessor's Office

- **10104-53020 - Other Supplies** Request: **\$150** **0% increase**

The Assessor's Office requires an allowance for miscellaneous items not provided by others. Fees incurred in FY20: **\$57** Chase card closing fee used for additional supplies purchased by former Assessor. FY21: **\$300** replacement of 2 broken task chairs, additional supplies, office's portion of Finance Infoshred bill

- **10104-53200 - Pricing Books** Request: **\$500** **0% increase**

Pricing guides are provided through a bulk purchase contract conducted by the CAAO. The 5 most common pricing books (NADA - as recommended by OPM) were packaged last year at a cost of \$470 and are estimated to increase slightly in cost. Online pricing tools will be utilized for unique categories/older/antique vehicles to avoid purchasing additional pricing manuals as was past practice.

Fees incurred in FY20: **\$470** FY21: **\$470**

UTILITY COMMUNICATIONS, INC.

920 Sherman Avenue • Hamden, Connecticut • 06514
Phone: (203) 287-1306 (800) 443-1306 Fax: (203) 248-9167

Date 12-11-20

To: ACCTS PAYABLE DEPT

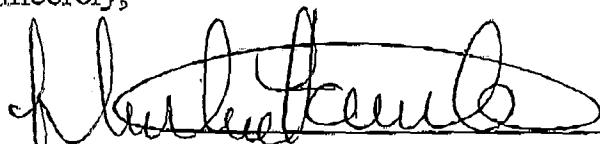
Fax # 860-440-057

Please check your records. The following invoices on your account are now due. If you have any questions regarding the following invoices please give me a call at (203) 287-1306.

INVOICE - 80441 - \$689.79

If you have already sent your payment please disregard this notice and accept our thanks for you payment

Sincerely,



Shiohan Hawley
Accounts Receivable

UTILITY COMMUNICATIONS

920 Sherman Avenue
Hamden CT 06514

INVOICE

Doc#	Date	Due Date	Page
80441	10/29/2020		1

(203) 287-1306

Bill to: Accts Payable
Waterford, Town Of
Finance Dept.
15 Rope Ferry Road
Waterford CT 06385Ship to: WATERFORD POLICE DEPARTMENT
ATTN CHIEF MAHONEY
41 AVERY LANE
WATERFORD CT 06385

Act	P/O	Terms	Slsman
70488		NET 30 DAYS	137

Quantity	Description	Unit Price	Total
2	M3046-V	338.17	676.34
1	CAM AXIS W/WDR INDR IP		
	UPS GROUND	13.45	13.45
	release		
Please Remit Invoice Total —————>			689.79



STATE OF CONNECTICUT DEPARTMENT OF MOTOR VEHICLES

60 State Street, Wethersfield, Connecticut 06161
ct.gov/dmv



BILL TO

Waterford (ASSESSOR)
15 Rope Ferry Rd
Waterford, Ct 06385

Invoice

DATE	INVOICE #
6/16/2020	3414



Inv# 3414 \$ 250.00
CT DMV
06/16/2020 * Pages 1 FP1 D0C37S300

DUE DATE

7/17/2020

Seat Belts Do Save Lives

DESCRIPTION	QTY	AMOUNT
-- PAYMENT DUE UPON RECEIPT --		
PERIOD COVERED: 7/01/20 TO 06/30/21		
YEARLY BILL FOR ONLINE ACCESS TO MOTOR VEHICLE INFORMATION. (DMV DIRECT PROGRAM)	1	250.00
* YOU ARE RESPONSIBLE FOR PAYMENT UNTIL YOU WITHDRAW FROM THE PROGRAM OR YOU HAVE BEEN NOTIFIED OF TERMINATION BY DMV		
PLEASE CONTACT THE FISCAL OFFICE AT 860-263-5269 WITH ANY QUESTIONS.		
PLEASE REMIT THE TOTAL DUE TO:		
DEPARTMENT OF MOTOR VEHICLES 3RD FLOOR/FISCAL SERVICES RM 327 60 STATE STREET WETHERSFIELD, CT 06161		
APPROVED		
VENDOR# _____		
C # _____ FY 2021		
CLOSE PO Y _____ N _____		
AMOUNT # 1010411552030		
AMOUNT \$ 250.00		
SIGN _____		
DATE 6/30/2020		
Please return one copy of invoice with payment.		
Total		\$250.00
Payments/Credits		\$0.00
Balance Due		\$250.00

REV. 06/2018

Inv# CARO-DMV PRICE HALTO \$ 250.00
CT DMV
10/07/2019 # Pages 5 FP5 DOC23S1055

C A A O, INC.

On-line DMV Direct Data Access
with the
**CONNECTICUT DEPARTMENT OF MOTOR
VEHICLES**

Vendor # 63
APPROVED FOR PAYMENT
ACCT# 1010452030
AMOUNT \$ 250.00
FISCAL YEAR 19
SIGNATURE Km
DATE 10/11/19

CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS, INC.

ACCESS TO CONNECTICUT DEPARTMENT OF MOTOR VEHICLES (DMV)

The Connecticut Association of Assessing Officers, Inc. (CAAO) has an on-line data access agreement with the Connecticut Department of Motor Vehicles (DMV). The agreement allows Connecticut municipalities to access, directly into DMV Records, DMV's registration, and delinquent tax records. The program is known as "DMV DIRECT".

The municipalities who currently participate in this program have found the system to be useful. If your municipality is interested in participating in this program, the following information and steps are required:

PC Requirements

- Desktop operating system
- Internet connection is required to access CIVLS
- Browser Based: Microsoft i.e. (recommended), Chrome, & FireFox (least desirable as it seems to be problematic)



In order to set up an account to access DMV DIRECT you will need to enter into a contract with CAAO. This requires two forms to be completed and signed (the letter of participation and DMV Direct Responsible Party form), and return them to Patrick Sullivan at the Town of West Hartford assessor's office and Chairman of the CAAO MV Committee for processing.

DMV Access Fee and Letter of Participation

DMV's current access fee is \$250.00 for Towns with a population of 38,000 and under and \$450.00 for Towns with a population over 38,000. This fee is necessary to cover DMV's administrative and direct information cost. Please note the fee to participate is based on the period between July 1 and June 30. You will be billed again each June (due July 1) for the \$250/\$450 participation fee no matter when you decide to join DMV Direct.

Please make the check payable to: CT Dept. of Motor Vehicles, 60 State St, Wethersfield CT, 06161 and mail the original Letter of Participation, DMV Responsible Party Form, and your check to:

Town of West Hartford
Dept. of Assessment – Patrick Sullivan
50 South Main St
West Hartford, CT. 06107

You will not receive your password and access until the above steps have been completed. Upon receipt of the municipality's letter of participation, DMV Responsible Party Form and payment made payable to DMV, DMV will contact you directly to assign the necessary data-access user name and password(s) to the authorized Municipal Tax Assessor. Please note that set-up takes approximately 2-4 weeks.

If your municipality is interested in accessing DMV data, or if you have any questions, please contact Patrick Sullivan at (860) 561-7412 or by e-mail at Patrick.sullivan@westhartford.org

REV. 06/2018

**CAAO - DMV
DIRECT LETTER OF PARTICIPATION**

Date: 10/12/19

Patrick Sullivan
Department of Assessment
Town of West Hartford
50 South Main St
West Hartford CT. 06107

Dear Patrick:

The Town/City of Waterford would like to access online data with the Department of Motor Vehicles (DMV).

Please consider this our "Letter of Participation".

1. The Town/City of Waterford would like to participate in the Connecticut Association of Assessing Officers' (CAAO) and DMV's "DMV DIRECT" online access program.
2. The Town/City agrees to hold the CAAO and DMV harmless from any liability resulting from misuse of the online data.
3. The Town/City has all the necessary hardware in place and has completed the Responsible Party Form in order to access the DMV system.
4. The Town/City has enclosed with this Letter of Participation the \$250/\$450 access fee *payable to DMV* and understands that we will be billed each June \$250/\$450 for our participation in this program for the period of July 1, to the following June 30th.
5. The following staff member(s) in the Assessor Office will have access to the online DMV data:
Paige Walton - Assessor Eva Penski
Charlie Lebeck
6. The Town/City agrees to notify both you and DMV if there are changes in the personnel using the system, or if it terminates their participation in the program.
7. The person signing this letter represents that he or she has been authorized by the Town/City to do so on its behalf and to bind the Town/City to the Agreement.

Thank you for your consideration.

Sincerely,

Paige S. Walt

CAAO-DMV Direct Responsible Party Form

Date: 10/10/19

Municipality: Town of Watford

3 Digit Town Number: 152

Population: 18,907

Address: 15 Rope Ferry Rd. Watford, CT 06385

Name of town Tax Assessor/CAAO member responsible for access of authorized users:

Paige S. Walton

Telephone number: (860) 444-5822

Mailing Address: (if different from above)

Email address: pwalton@watfordct.org

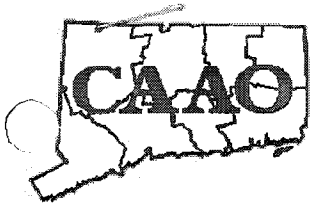
Internet Provider: _____

Browser: Microsoft i.e. (recommended) Chrome, & Firefox



DMV 1-YEAR FEE: \$250.00

Your town will be responsible for the annual fee and DMV will send an invoice for your participation in the DMV Direct program each June for the next fiscal year's fee. If you decide to withdraw from DMV Direct, you must notify DMV. There is no prorating or refunds of the DMV Direct fee.



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS
MOTOR VEHICLE COMMITTEE

SUBSCRIPTION RENEWAL PACKAGE
2020 MOTOR VEHICLE PRICING PACKAGE

Wednesday, April 22, 2020

Waterford Assessor's Office
Town Hall
15 Rope Ferry Road
Waterford CT 06385-2806

1 2020 MOTOR VEHICLE PRICING PACKAGE \$ 470

Includes one (1) copy each of the following:

NADA Used Car Guide NADA Older Used Car Guide
NADA Commercial Truck Guide NADA Motorcycle Guide
NICB Vehicle ID Manual

ADD Total Amount figure from "ADDITIONAL NADA" form \$ 0

TOTAL AMOUNT DUE TO CAAO, INC \$ 470

MAKE CHECK PAYABLE TO CAAO, INC

APPROVED

VENDOR# ALL ORDER FORMS & PAYMENTS TO:

PO# FY 2020

CLOSE PO Y N

ACCOUNT # 10104-53200

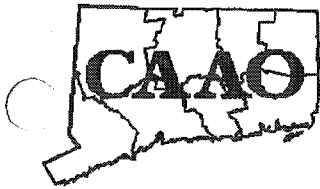
AMOUNT \$470.00

SIGN Greg S. Welch

DATE 4/29/2020

Sandy Rainieri
City of Milford
Assessor's Office
70 West River St
Milford, CT 06460

Re-Approved by R. Allen
(see attached)



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS
MOTOR VEHICLE COMMITTEE

ORDER FORM – “**ADDITIONAL NADA**” 2020 PRICING GUIDES

TOWN OF: **Waterford Assessor's Office**
 Town Hall
 15 Rope Ferry Road
QTY **Waterford, CT 06385-2806**

# _____	October issue, NADA Official Used Car Guide	\$ 48.00 ea _____
# _____	September-December issue, NADA Official Older Used Car Guide	\$ 35.00 ea _____
# _____	September-December issue, NADA Classic, Collectible, Exotic Guide	\$ 35.00 ea _____
# _____	September-December issue, NADA Commercial Truck Guide	\$ 48.00 ea _____
# _____	September-December issue, NADA Motorcycle/Snowmobile Guide	\$ 35.00 ea _____
# _____	December issue, NADA Vintage Collectible & Retro Motorcycle Guide	\$ 30.00 ea _____
# _____	September-December issue, NADA Recreational Vehicle Guide	\$ 55.00 ea _____
# _____	NADA CONNECT RV* <u>Online Subscription Only</u> *(replaces Older RV Guide) & has values for both RV Guides (years 2020-1968)	\$100.00 ea _____
# _____	NADA Online (replaces E-Valuator)	\$170.00 ea _____

_____ **TOTAL ORDER**

TOTAL AMOUNT \$ _____ *D*
(Add this amount to the billing form)

MAKE CHECK PAYABLE TO:

CAAPO, INC

MAIL ALL ORDER FORMS & PAYMENTS TO:

Sandy Ramieri
City of Milford
Assessor's Office
70 West River St.
Milford, CT 06460

Monthly Postage
Assessor's Office

Assessor's Office FY 20 Postage	Metered Mail	# Items BAA FY 20 Postage	Metered Mail	# Items
Jul-19	15.15	30	0	0
Aug-19	4.8	8	1	2
Sep-19	33.66	60	0	0
Oct-19	38.65	56	1.5	3
Nov-19	10.95	22	0	0
Dec-19	6.5	13	0	0
Jan-20	986.35	1948	5.5	11
Feb-20	27.08	37	21	42
Mar-20	21.15	42	37.12	73
Apr-20	176.9	344	23.26	42
May-20	21.82	31	1.12	1
Jun-20	20.6	24	0	0
Total Postage	\$ 1,364	2615	\$ 91	174
FY21 Postage				
Jul-20	99.74	174	0	0
Aug-20	20.08	29	0	0
Sep-20	43.45	59	1	2
Oct-20	20.6	38	0	0
Nov-20	31	57	0	0
Total Postage	\$ 215	357	\$ 1	2



INTERNATIONAL ASSOCIATION
OF ASSESSING OFFICERS

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2806

Membership Dues

DUES INVOICE

Please return with payment on or before the due date to ensure your membership does not lapse.

IAAO

314 W 10th St
Kansas City, MO 64105-1616 USA
Telephone 816/701-8100
Toll Free 800/616-4226
Fax 816/701-8149
Internet www.iaao.org
Federal I.D. No. 36-2210012

	Begin Date	End Date	Amount Due
Regular Membership for Paige S. Walton (Regular)	1/1/21	12/31/21	\$220.00
Fair and Equitable	1/1/21	12/31/21	\$0.00
Journal of Property Assessment and Administration	1/1/21	12/31/21	\$0.00

APPROVED

VENDOR# 223

PO# FY 2021

CLOSE PO Y N

Jurisdiction no longer paying your membership dues? Apply for the IAAO Membership Assistance Fund, sponsored by Vision Government Solutions. Visit www.iaao.org/VisionGrant for more information.

AMOUNT \$220.00

TOTAL DUE: 220.00

You have been a member since May, 2007

Mailing Address:

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2806

DATE 12/7/2020

IAAO offers six professional designations increasing competence of assessment personnel through education:



Certified Assessment Evaluator
Assessment Administration Specialist
Cadastral Mapping specialist
Personal Property Specialist
Residential Evaluation Specialist
Mass Appraisal Specialist
Please contact designations@iaao.org for more information.

Pay online anytime at www.iaao.org/

Member Number: 00144399
Invoice Number: 21-00144399
Amount Due: 220.00
Due Date: 1/1/2021

CHECK OR CREDIT CARD ONLY
Make checks payable to IAAO in U.S. \$ currency.

If you would like to make a change to this invoice, please call the IAAO Membership Department at 1-800-616-4226.

Please return form with payment to:
IAAO
PO Box 29900 Dept. 929
Phoenix, AZ 85038-0900

Credit card payments may be faxed to 1-816-701-8149.

CARD NUMBER	VISA	EXPIRATION
NAME ON CARD	CVV/CID	

SIGNATURE: _____

The provided e-mail is for the servicing of your account. It is IAAO Policy not to sell, rent, or distribute e-mail addresses.
Questions or Concerns? Please call the IAAO Membership Department at 1-800-616-4226.

Northeastern Regional Association of Assessing Officers

An Affiliate of the International Association of Assessing Officers

Membership Application

Dear Assessing/Appraising Professional,

Below is an application to renew your membership to the Northeastern Regional Association of Assessing Officers. Our organization has been in existence for over fifty years and was created to provide training and educational opportunities for assessing officials, to improve assessment standards and to promote more efficient and uniform administration of property tax laws throughout the northeastern United States and Canada.

In order to reach the above goals, the NRAAO sponsors an annual conference. This year the conference was held at Gurney's Newport Resort, 1 Goat Island, Newport, Rhode Island 02840, 401-849-2600, April 28 - May 1, 2019. As a professional in the appraising field, you would be gaining insight to how the assessment field operates, learn about new laws and regulations and meet with assessing officials from various communities, states and provinces. As an assessor, you too would be gaining much needed information in order to perform your job in a professional manner. As an added bonus, credits are given towards certification in each related field. In addition, conference registration fees will be reduced for NRAAO members attending the 56th Annual Conference to be held at Atlantic City Hard Rock Hotel & Casino Atlantic City, New Jersey MAY 17-20, 2020

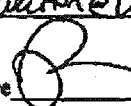
Please fill out the application and send it along with the proper fee, via check, money order or voucher made out to NRAAO and return it to Betsy Quist, P.O. Box 5005, Woodbridge, CT 06525.

OR PAY ONLINE - NRAAO.ORG (fees apply)

The fee structure is as follows:

Active Member (Assessing Officials):	\$ 40.00
Associate Member (Retired Officials):	\$ 15.00
Subscribing Members (Corporate, Reps, etc):	\$ 100.00

RENEWAL MEMBERSHIP APPLICATION 2020 NORTHEASTERN REGIONAL ASSOCIATION OF ASSESSING OFFICERS

Name: Paige Walton Title: Assessor Date: 12/3/19
Jurisdiction/Firm: Town of Watford Phone Number: (860) 444-5822
Mailing Address: 15 Rope Ferry Rd. City: Watford ST: CT Zip: 06385
Fax Number: _____ E-Mail Address: gwalton@watfordct-ny
Signature: 

Complete this application and return it with the appropriate fee by check, voucher or money order made out to NRAAO and return to NRAAO, c/o Betsy Quist, P.O. Box 5005, Woodbridge, CT 06525-5005. If you have any questions, please do not hesitate to call me at 203-389-3417 or e-mail at bquist@woodbridgect.org

**GREATER NEW LONDON AREA ASSESSORS
ASSOCIATION**

2019 Membership Dues Notice

For April 1, 2019 through March 31, 2020

Name: Paige S. Walton
Municipality: Town of Waterford
Address: 15 Rope Ferry Rd.
City/State/Zip: Waterford, CT 06385
Phone Number: (860) 444-5822
Email: gwalton@gnlaaa.org

Dues are \$15.00

Make checks payable to GNLAAG

Please remit your payment with completed form to:

Kathi Race, Assessor's Office
Town of East Hampton
20 East High Street
East Hampton, CT 06424-1000

****Please complete a separate form for each employee as necessary****

Connecticut Association of Assessing Officers
c/o Fauna Eller, Assessor's Office
505 Silas Deane Highway
Wethersfield, CT 06109-2280

Membership Invoice

Invoice # 2149

Paige Walton
15 Rope Ferry Road
Waterford, CT 06385-2806

VENDOR# 69

PO# FY 2021

CLOSE PO Y N

ACCOUNT # 10104-52050

AMOUNT \$70.00

SIGN \$70.00 / [Signature]

Thank you for your membership! According to our records, your membership is about to expire. In order to continue your membership and all the benefits it provides, please send in payment before the Due Date below.

Thanks again and we hope you'll renew your membership in Connecticut Association of Assessing Officers!

MEMBER	ITEM	AMOUNT
Walton, Paige 1/1/2021 - 1/1/2022	Regular Member Membership Dues	70.00
FILE COPY		
TOTAL:		70.00

Payment Stub

Please tear off this stub and include with your payment.
Send payment to:

CAAO
c/o Fauna Eller, Assessor's Office
505 Silas Deane Highway
Wethersfield, CT 06109-2280

or login and pay online at
<https://caao.com>

Member: Walton, Paige

Invoice #: 2149
Description: Membership Dues
Date Due: 2/15/2021

Amt. Due: 70.00

Enclosed: ☐

CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS, INC.

Inv# CHARLES LOBACZ RENEM \$ 70.00
CAAO, INC
02/28/2020 # Pages 1 FP1 D0C32S694



President – Shawna Baron

President Elect – Thomas DeNoto
Secretary – Pamela Deziel
Treasurer – Lawrence G. LaBarbera

2020 - Renewal Notice

Your dues invoice is shown below and your membership will be paid until December 31st, 2020.

This year you are able to renew directly online by paying by PayPal. PayPal accepts most credit cards.

Member Type: Regular

~~Dues Amount: \$70.00~~ (Paid by Check)

Dues Amount: \$72.45 (Paid by Paypal)

Please make check payable to CAAO

Town of Wethersfield
Fauna Eller
505 Stratfield Ave
Wethersfield, CT 06094

CAAO Federal Tax ID # 06-1317665

From the CAAO Bylaws: Annual dues shall be due and payable on the first business day of each calendar year to the Treasurer. Any member whose dues have not been paid on or before the following March 31st shall forfeit all rights and privileges as a member of this Association until such time, and in accordance with these by-laws, as when those dues are paid in full.

Please take the time to review your data in the membership directory and update and out of date information.

Name of Member: Charles Lobacz
Municipality: Wethersfield
Position: Assistant Assessor
Date Joined CAAO: 06/07/97

If your date joined is incorrect please contact me at fauna.eller@wethersfieldct.gov.

Please return this notice with your payment. Thank you.

APPROVED

VENDOR# 69

PO# FY 2020

CLOSE PO Y N

ACCOUNT# 10104-62050

AMOUNT \$ 70.00

Sincerely,
Fauna Eller
SIGN Ray S. Eller
Membership Chairman

DATE 2/28/2020



The Connecticut Chapter of IAAO and the CAAO
are pleased to announce presentations for:

2020 Kohl's v Rocky Hill Court Decision and Assessor Potpourri

This 4 hour program will provide a review of the 2020 Kohl's personal property court decision, which reversed a Superior Court decision and sent the case back for a new trial. The Assessor Potpourri will include a roundtable discussion by Tim Hutvagner and Mary Gardner on effects of Covid in an office setting. Sonia Rutchick will also present her process of inventorying construction site equipment and communications with general contractors in an effort to document assets for the personal property assessment.

When: Wednesday, October 7, 2020

Where: Churchill Park Pavilion
1991 Main St
Newington, CT

APPROVED

VENDOR# _____ Time: 10:00 am to 3:00 pm
Registration 9:30am

PO# _____ FY 2021

CLOSE PO Y _____ Post: ☒ \$30 per person
Box lunch will be provided

ACCOUNT # 10104-52050

AMOUNT \$30.00 Please RSVP by Thursday, October 1, 2020

SIGN [Signature] 4 hours CEU's pending CCMA Approval

DATE 9/24/20 Please bring your own chair and mask for social distancing

For questions or to make your reservation, contact Brendan Moriarty
860-258-2722 or email bmoriarty@rockyhillct.gov

Name of Attendee: Paige S Walton
Organization: Town of Waterford
Phone: (860)444-5820 Email: pwalton@waterfordct.org

Checks Payable to the:

~~CT Chapter of IAAO~~
~~C/O Brendan Moriarty~~
~~Town of Rocky Hill~~
~~761 Old Main Street~~
~~Rocky Hill CT 06067~~



Connecticut Chapter of the International Association of Assessing Officers

Course 402 – Tax Policy

Course 402 offers student's strategies for assisting in the effective formulation and implementation of tax policies and presents background enabling students to understand the context under which property tax policy is established. Students will be given analytical tools with which they can explain the effects of proposed property tax changes. They will be provided with a sound theoretical basis to guide decision-making and to assist in creating workable solutions for their jurisdictions. The course is designed for assessment administrators and students of taxation, as well as professional policy advisors who guide and make decision in the area of tax policy on a regular basis.

Recommended: Course 101 and Course 102, Property Assessment Valuation (PAV) textbook (3rd edition) AQB Approved: 33.50 CE, 33.50 hours CE with exam / 30 hours CE no exam

When: March 16th-20th, 2020

Where: Bristol Public Library

5 High Street

Bristol, CT 06010

Time: 8:00am to 5:00pm

Cost: \$550.00 CT Chapter Members

\$600.00 Non-Members

Course fees include the cost of materials. Any required books or periodicals can be purchased at IAAO.org
(Lunch on your own)

RSVP By Friday February 7th, 2020

Refund Policy: Any cancellations prior to the RSVP deadline will be issued a 100% refund. Any cancellations after the cancellation deadline will only be issued a 50% refund.

For questions or to make your reservation contact Sarah Scacco 203-563-0123 or email to
Sarah.Scacco@wiltonct.org

Municipality/Company: Town of Waterford

Name of Attendee: Paige S Walton

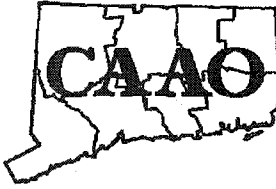
Phone 860-857-8303

Email pwalton@waterfordct.org

Amount Enclosed \$ 550.00

Checks Payable to: CT Chapter of IAAO

Mail to: CT Chapter of IAAO
C/O Sarah Scacco
Wilton Assessor's Office
238 Danbury Rd
Wilton, CT 06897



**Connecticut Association of Assessing Officers, Inc.
Education Committee**

Chandler Rose, CMA II, Co-Chair
William Gaffney, CCMA II, Co-Chair

EDUCATIONAL OFFERING

Course: BOARD OF ASSESSMENT APPEALS WORKSHOP

Instructor: Brian Smith, CCMA II

Date: Thursday, January 23, 2020**

Time: Registration 5:45 p.m. - Workshop 6:00 - 9:00 p.m.

Location: Colchester Town Hall - Contois Meeting Room ONE

127 Norwich Avenue
Colchester, Connecticut 06415

Cost: \$50.00

Make Checks Payable to: CAAO

NAME:

Eva Renski

ADDRESS:

53 Oslo Street Mystic CT 06355

PHONE:

860-367-4027

EMAIL:

ERenski@waterfordct.org

Complete this form and mail along with your check in the amount of \$50 to:

Colchester Town Hall
127 Norwich Avenue
Colchester, Connecticut 06415
Attn: John Chaponis

Any questions, please contact John Chaponis at (860) 537-7205 or Assessor@ColchesterCT.gov

**In the event of inclement weather requiring a cancelation, the Workshop will be rescheduled for January 27, 2020.

AAT COMMITTEE

ADMINISTRATIVE ASSESSMENT TECHNICIAN (AAT) MODULE 1D INTRODUCTION TO BENEFIT PROGRAMS & EXEMPTIONS

DATES: February 13, 19 and 26. (Snow dates: February 20 and 27)

TIME: There are two separate classes, one in the morning and one in the afternoon.

Class 1 - 9:00 A.M - 12:00 P.M.

Class 2 - 1:30 P.M. - 4:30 P.M.

*Please note: If the number of registrants for either the morning or the afternoon class does not meet the minimum class size, they will be combined into one class. The class will be offered in the time for which the majority had registered.

PLACE: QUALITY DATA SYSTEMS
121 MATTATUCK HEIGHTS
WATERBURY, CT 06705

The topics covered in this module are: Homeowners, Veterans, Additional Veterans, Blind, Totally Disabled and Active Duty MV. The module consists of three half days. *Please note this module is not vendor specific and will not cover any software.

FEE: \$60.00 (Make checks payable to CAAO)

Registration must be received by February 4, 2020 and mailed with the form and fee (or purchase order) to:

Pam Deziel
Assessor's Office
Wolcott Town Hall
10 Kenea Ave
Wolcott, CT 06716

Inv# AA TECH CLASS FEB \$ 60.00
CAAO, INC
12/04/2019 # Pages 1 FP1 DOC25S1297

Please contact Pam if you have any questions at: 203-879-8100 x111 or pdeziel@wolcottct.org

Please send a copy of this form as registration with required fee (\$60.00) or copy of approved purchase order. Class size is limited to a maximum of 25 students with a minimum of 15 students.

Morning Class ☒

Afternoon Class ☐

(For AAT use only)

CHECK# _____

PO# _____

AAT EXEMPTIONS/ABATEMENTS MODULE 1D

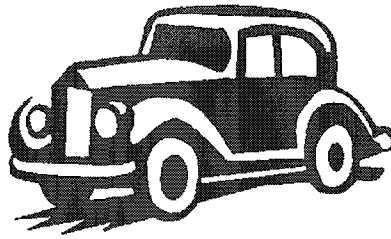
NAME: Eva Bensch

TOWN: Waterford

OFFICE PHONE: 860 444-5820

CELL PHONE: (860) 367-4027 (Contact if the class is cancelled due to weather.)

EMAIL: EBensch@Waterfordct.org



John Rainaldi, CCMA II, Co-Chair
Jrainaldi@manchesterct.gov

Patrick Sullivan, CCMA II, Co-Chair
Patrick.Sullivan@westhartfordct.gov

The DMV has informed us that the towns' Change-of-Address files have been placed on both the assessors' and the collectors' Tumbleweed sites. Your vendor should be contacting you this week with instructions to load them.

The file names are:

2020_05_01_INT0100TaxTownAddressUpdates_xxx.csv

2020_05_01_INT0100TaxTownNameUpdates_xxx.csv

John and Pat

This year is CAAO's Election year.

Become a leader within your professional organization. We are looking for members to run for President Elect, Secretary and Treasurer. CAAO could utilize the strengths that you possess and make our organization even better than it is now.

Anyone who is interested in running for one of these offices needs to send a nomination letter to the Committee Chairperson, Gail Gwiazdowski assessor@pomfretct.gov or assessor@lisbonct.com by May 29th. (Note: the e-mails are a correction from what was printed in the recent Assessorreporter)

2020 Annual School for Assessors and Boards of Assessment Appeals
CCMA Courses 1A, 1B, 2A, 2B, 3 & 4
August 10 – 14, 2020

Registrations for the 2020 Annual Assessor School are now being accepted for CCMA Courses 1A, B, 2A, 2B, 3 and 4. The cost per course is \$300.00.

Note: There will be no workshops for recertification credit offered by the Annual Assessor School this year.

Class hours will be 8:30 am to 4:30 pm Monday thru Thursday. Class will start at 8:30 on Friday for the exam.

The location of each class is to be determined at a future date. As soon as the class location is confirmed students will be notified.

The number of seats available in each class will be determined by the location of the class.

A seat in the class will be reserved upon receipt of either payment in full or an approved purchase order.

Courses 2A, 2B, 3 and 4 require purchase of "IAAO Property Assessment Valuation, Third Edition". It is available for sale on the IAAO Website for \$50.00.

Follow this link for the CCMA Class Reading List

For online registration or a printable registration form, click on the links below.

Click here to register online. Click here to print a registration form.

If you have any questions regarding registration please contact Pam Deziel at pdeziel@wolcottct.org or 203-879-8100 x111.

THE DAY PUBLISHING COMPANY
PO BOX 1231
47 EUGENE O'NEILL DRIVE
NEW LONDON, CT 06320-1231

ACCOUNT NUMBER	CUSTOMER	BILLING PERIOD
D93229	WATERFORD - TOWN OF/ ASSESSORS	01/01/20-01/31/20

Client		PAGE NUMBER	DUE DATE
		Page 1 of 1	2/29/20
CURRENT	OVER 30 DAYS	60 AND OVER	TOTAL DUE
\$ 123.90	\$ 0.00	\$ 0.00	\$ 123.90

WATERFORD - TOWN OF/ ASSESSORS
15 ROPE FERRY RD
WATERFORD, CT 06385

Is your digital marketing really working? For a FREE comprehensive digital audit call Aaron Witko at 860-701-4332 today!

CHECK NUMBER

AMOUNT PAID

THANK YOU FOR YOUR BUSINESS!
PLEASE RETURN UPPER PORTION WITH YOUR REMITTANCE

DATE	DESCRIPTION	PUBLICATIONS	REFERENCE # / PO #	SIZE/LINES or QTY	GROSS AMOUNT	OTHER	NET AMOUNT
01/23/20	Previous Balance						\$0.00
	853720 LEGAL TOWN OF WATERFC	DAY,DWB	D00853720	2 Col X 21 Lines			\$123.90
APPROVED VENDOR# <u>157</u> PO# <u>✓</u> FY <u>2020</u> CLOSE PO Y <u>✓</u> N <u> </u> ACCOUNT # <u>10104-52010</u> AMOUNT <u>123.90</u> SIGN <u>[Signature]</u> DATE <u>2/6/2020</u>							

Day Publishing Company
Community Classifieds - Toll Free
Day Publishing Company - Toll Free

860-442-2200
800-582-8296
800-542-3354

Accounting Fax 860-437-7504
Advertising Fax 860-437-8780
Classified Fax 860-442-5443

BILLING PERIOD	ACCOUNT NUMBER	CUSTOMER/CLIENT	
01/01/20-01/31/20	D93229	WATERFORD - TOWN OF/ ASSESSORS	
CURRENT DUE	OVER 30 DAYS	60 AND OVER	TOTAL DUE
\$ 123.90	\$ 0.00	\$ 0.00	\$ 123.90

The Day theday.com

THE DAY PUBLISHING COMPANY
PO BOX 1231
47 EUGENE O'NEILL DRIVE
NEW LONDON, CT 06320-1231

ACCOUNT NUMBER		CUSTOMER	BILLING PERIOD
D140217		EAST LYME ASSESSORS	09/01/20-09/30/20
Client		PAGE NUMBER	DUE DATE
		Page 1 of 1	10/31/20
CURRENT	OVER 30 DAYS	60 AND OVER	TOTAL DUE
\$ 857.55	\$ 0.00	\$ 0.00	\$ 857.55

EAST LYME ASSESSORS
PO BOX 519
NIANTIC, CT 06357

Is your digital marketing really working? For a FREE comprehensive digital audit call Aaron Witko at 860-701-4332 today!

CHECK NUMBER

AMOUNT PAID

THANK YOU FOR YOUR BUSINESS!
PLEASE RETURN UPPER PORTION WITH YOUR REMITTANCE

DATE	DESCRIPTION	PUBLICATIONS	REFERENCE # / PO #	SIZE/LINES or QTY	GROSS AMOUNT	OTHER	NET AMOUNT
09/05/20	Previous Balance						\$0.00
09/05/20	873237 Legal Notice Towns of EAST L	DAY,DWB	D00873237	3 Col X 95 Lines			\$857.55
				Joint Legal Ad	\$ 857.55		
VENDOR# 724							
PO# _____ FY _____							
CLOSE PO Y _____ N _____							
ACCOUNT # 10104-52010							
						\$ 214.39	
Pay S. Wolf							
10/9/2020							

Day Credit Department
Community Classifieds - Toll Free
Day Publishing Company - Toll Free

860-701-4204
800-582-8296
800-542-3354

Accounting Fax 860-437-7504
Advertising Fax 860-437-8780
Classified Fax 860-442-5443

BILLING PERIOD		ACCOUNT NUMBER	CUSTOMER/CLIENT
09/01/20-09/30/20		D140217	EAST LYME ASSESSORS
CURRENT DUE	OVER 30 DAYS	60 AND OVER	TOTAL DUE
\$ 857.55	\$ 0.00	\$ 0.00	\$ 857.55

Payment Terms - Net End of Month A FINANCE CHARGE OF 1.5% PER MONTH ON ACCOUNTS NOT PAID WITHIN THE MONTH FOLLOWING PUBLICATION

ton

Diane Vitagliano <dvitagliano@eltownhall.com>

Monday, October 05, 2020 1:42 PM

Melinda R. Kronfeld; Assessor; Paige Walton

Invoice from the Day for the Joint ad

0711_001.pdf

Subject:

Attachments:

Follow Up Flag:

Flag Status:

Follow up

Flagged

CAUTION: This email originated from outside of the organization.

Do not click links or open attachments unless you recognize the sender's email address and know the content is safe.

Good Afternoon,

Hope all are well. Attached is the invoice for the Joint Ad. It certainly is nice to be able to split it 4 ways. That is \$214.87 each.

Thank you

Diane Vitagliano

Diane Vitagliano, CCMAII
Assessor East Lyme
860-691-4107

\$ 857.55 / 4 =

\$ 214.39



Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury, CT 06705

Budget Letter 2021-22

Date	Letter #
11/30/2020	2020E3189

Name / Address

Waterford Assessor
Town Hall
15 Rope Ferry Rd.
Waterford, CT 06385

Contact	Leo DiNicola
Phone #	2037559031
Fax #	203-574-4360
e-mail	LEO@QDS.BIZ
Cellphone #	203-910-2316

Description of Services

Est Qty

Total

Software Services

Annual Software Support Fee - Assessor Software

1

5,725.00

Annual Subscription Fee - Personal Property CAMA

1

2,000.00

Annual Subscription Fee - QDS Hosted Personal Property Declaration Form

1

275.00

DRaaS - Disaster recovery as a service

84

462.00

Double Sided laser Printing & Indexing of Grand List - Regular

4

1,860.00

Permanently Binding Grand List Book(s) - Regular List

4

300.00

Double Sided laser Printing & Indexing of Grand List - MVS

1

465.00

Permanently Binding Grand List Book(s) - MVS

1

75.00

Assessor Annual Cost of Services; Maintenance of Town FTP (File Transfer Protocol)

1

500.00

Folder

Subtotal

11,662.00

PP Declarations - Printing and Mailing

Setup Charge

1

100.00

Printing, Processing and Nesting Personal Property Declaration Forms - Long Forms

1,320

660.00

- Personalized

Printing, Processing and Nesting Personal Property Declaration Forms - MFG Forms

20

10.60

- Personalized

Printing, Processing and Nesting Personal Property Declaration Forms - Short Forms

10

4.00

- Personalized

Print, Process, Insert, and Mail PP Declarations with Personalized information and

QTY-1320-6x9 envelopes - not including postage

1st Class Postage - CASS Certified Rates

1,350

580.50

www.qds.biz

Grand Total

Review this letter carefully - call if
items need to be removed or added -
Sign and return promptly

Customer Acceptance Signature: _____

Print Name and Title: _____

Customer Acceptance Date: _____

PO #:

Enter Total based on options chosen



Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury CT 06705

Invoice	
Date	Invoice #
10/14/2020	2019-5522

Bill To
Waterford Assessor
Town Hall
15 Rope Ferry Rd.
Waterford, CT 06385

Ship To

FILE COPY

S.O. No.	P.O. No.	Terms	Due Date	Ship Date	Ship Via	Tracking #
		Due on receipt	10/14/2020	9/21/2020	US Mail	
Description					Qty	Amount
PP DECLARATIONS - ONLINE LETTER						
PP Declarations - Printing and Mailing						
Printing, processing, and nesting personal property online letters.					1,329	332.25
#10 Mailing Envelopes 24# WW - 1 sided - min charge \$ 90.00					1,350	90.00
CASI certify File					1	75.00
1st Class Postage - CASS Certified Rates					1,329	549.64
APPROVED						
VENDOR# <u>749</u>						
PO# <u> </u> FY <u>21</u>						
CLOSE PO Y <u> </u> N <u> </u>						
ACCOUNT # <u>10104-5205</u>						
AMOUNT <u>\$1,046.89</u>						
SIGN <u>[Signature]</u>						
DATE <u>11/14/2020</u>						
Total Due						\$1,046.89
Payments/Credits						\$0.00
Balance Due						\$1,046.89

Contact	Leo DiNicola CFO
Phone #	2037559031
Fax #	203-574-4360
e-mail	LEO@QDS.BIZ
Web Site	www.qds.biz

\$1,069.50
For 1,350 total accounts

Cost Per Image Agreement



Supplier Name-Address:			
Owner: XEROX FINANCIAL SERVICES LLC ~ 201 Merritt 7, Norwalk, CT 06851		Agreement Number:	
CUSTOMER INFORMATION			
CUSTOMER	Full Legal Name: WATERFORD, TOWN OF		Phone:
	Billing Address: 15 Rope Ferry Road		Contact Name: Rawla Dummett
	City: WATERFORD	State: CT Zip Code:	Contact Email: rdummett@waterfordct.org
EQUIPMENT	QTY	MODEL and DESCRIPTION	MONTHLY IMAGE ALLOWANCE*
	1	XEROX C8045	B&W COLOR
			1,000 0
			0.006 0.06
Meter Billing Frequency (Monthly unless checked): ☐ Other		* Included in Base Payment ** Plus applicable taxes	
Initial Term: 63 (in months)		Base Payment (plus applicable taxes): \$158.00	
Frequency: ☒ Monthly ☐ Quarterly ☐ Annually		Equipment Location (if different from Billing Address): 24 Rope Ferry Road	
CUSTOMER ACCEPTANCE			
BY YOUR SIGNATURE BELOW, YOU ACKNOWLEDGE THAT YOU ARE ENTERING INTO A NON-CANCELLABLE AGREEMENT AND THAT YOU HAVE READ AND AGREED TO ALL APPLICABLE TERMS AND CONDITIONS SET FORTH ON PAGES 1 AND 2 HEREOF.			
Authorized Signer: <i>[Signature]</i>		Date: <i>[Signature]</i>	Federal Tax ID # (Required): 06-0002121
Print Name: RAWLA DUMMETT		Title: PURCHASING AGENT	
OWNER ACCEPTANCE			
Accepted By: Xerox Financial Services LLC		Name and Title:	Date:

TERMS & CONDITIONS

1. Definitions. The words "you" and "your" mean the legal entity identified in "Customer Information" above, and "XFS," "we," "us," "Owner" and "our" mean Xerox Financial Services LLC. "Party" means you or XFS, and "Parties" means both you and XFS. "Supplier" means the entity identified as "Supplier" above. "Acceptance Date" means the date you irrevocably determine Equipment has been delivered, installed and operating satisfactorily. "Agreement" means this Cost Per Image Agreement, including any attached Equipment schedule. "Commencement Date" will be a date after the Acceptance Date, as set forth in our first invoice, for facilitating an orderly transition and to provide a uniform billing cycle. "Discount Rate" means 2% per annum. "Equipment" means the items identified in "Equipment" above and in any attached Equipment schedule, plus any Software (defined in section 3 hereof), attachments, accessories, replacements, replacement parts, substitutions, additions and repairs thereto. "Excess Charges" means the applicable excess image charges. "Interim Period" means the period, if any, between the Acceptance Date and the Commencement Date. "Interim Payment" means one thirtieth of the Base Payment multiplied by the number of days in the Interim Period. "Payment" means the Base Payment specified above, which may include an amount payable to Supplier under the Maintenance Agreement to account for the Monthly Image Allowances listed above, the Excess Charges (unless otherwise agreed by you, Supplier and XFS), Taxes and other charges you, Supplier and XFS agree will be invoiced by XFS. "Maintenance Agreement" means a separate agreement between you and Supplier for maintenance and support purposes. "Origination Fee" means a one-time fee of \$125 billed on your first invoice, which you agree to pay, covering origination, documentation, processing and other initial costs. "Term" means the Interim Period, if any, together with the Initial Term plus any subsequent renewal or extension terms. "UCC" means the Uniform Commercial Code of the State(s) where XFS must file UCC-1 financing statements to perfect its interest in the Equipment.

2. Agreement, Payments and Late Payments. You agree and represent that the Equipment was selected, configured and negotiated by you based on your judgment and supplied by Supplier. At your request, XFS will acquire same from Supplier to lease to you hereunder and you agree to lease same from XFS. The Initial Term commences on the Commencement Date. You agree to pay XFS the first Payment plus any applicable Interim Payment no later than 30 days after the Commencement Date; each subsequent Payment shall be payable on the same date of each month thereafter. You agree to pay us all sums due under each invoice via check, Automated Clearing House debit, Electronic Funds Transfer or direct debit from your bank account by the due date. If any Payment is not paid in full within 5 days after its due date, you will pay a late charge of the greater of 80% of the amount due or \$25, not to exceed the maximum amount permitted by law. For each delinquent or returned Payment, you will be assessed the applicable fee, not to exceed \$35. Restrictive covenants on any method of payment will be ineffective.

3. Equipment and Software. To the extent that the Equipment includes intangible property or associated services such as software licenses, such intangible property shall be referred to as "Software." You acknowledge and agree that XFS is not the licensor of such Software, and therefore has no right, title or interest in it and you will comply throughout the Term with any license and/or other agreement ("Software License") with the supplier of the Software ("Software Supplier"). You are responsible for determining with the Supplier whether any Software Licenses are required, and entering into them with the Software Supplier(s) no later than 30 days after the Acceptance Date. YOU AGREE THE EQUIPMENT IS FOR YOUR LAWFUL BUSINESS USE IN THE UNITED STATES, WILL NOT BE USED FOR PERSONAL, HOUSEHOLD OR FAMILY PURPOSES, AND IS NOT BEING ACQUIRED FOR RESALE. You will not attach the Equipment as a fixture to real estate or make any permanent alterations to it.

4. Non-Cancellable Agreement. THIS AGREEMENT CANNOT BE CANCELLED OR TERMINATED BY YOU PRIOR TO THE END OF THE INITIAL TERM. YOUR OBLIGATION TO MAKE ALL PAYMENTS IS ABSOLUTE AND UNCONDITIONAL AND NOT SUBJECT TO DELAY, REDUCTION, SET-OFF, DEFENSE, COUNTERCLAIM OR RECOVERY FOR ANY REASON WHATSOEVER, IRRESPECTIVE OF THE PERFORMANCE OF THE EQUIPMENT, SUPPLIER, ANY THIRD PARTY, OR XFS. Any pursued claim by you against XFS for alleged breach of our obligations hereunder shall be asserted solely in a separate action; provided, however, that your obligations hereunder shall continue unabated.

5. End of Agreement Options. If you are not in default and if you provide no greater than 150 days and no less than 60 days' prior written notice to XFS, you may, at the end of the Initial Term or any renewal term ("End Date"), either (a) purchase all, but not less than all, of the Equipment by paying its fair market value, as determined by XFS in its sole but reasonable discretion ("Determined FMV"), plus Taxes, or (b) return the Equipment within 30 days of the End Date, at your expense, fully insured, to a continental US location XFS shall specify. You cannot return Equipment more than 30 days prior to the End Date without our consent. If we consent, we may charge you, in addition to all undiscounted amounts due hereunder, an early termination fee. If you have not elected one of the above options, this Agreement shall renew for successive 3-month terms. Either party may terminate the Agreement as of the end of any 3-month renewal term on 30 days' prior written notice and by taking one of the actions identified in (a) or (b) in the preceding sentence of this section. Purchase options shall be exercised with respect to each item of Equipment on the day immediately following the date of expiration of the Term of such item, and by the delivery at such time by you to XFS of payment, in form acceptable to XFS, of the amount of the applicable purchase price. Upon payment of the applicable amount, XFS shall transfer our interest in the Equipment to you on an "AS IS, WHERE IS," "WITH ALL FAULTS" basis, without representation or warranty of any kind.

6. Equipment Return. If the Equipment is returned to XFS, it shall be in the same condition as when delivered to you, except for "ordinary wear and tear" and, if not in such condition, you will be liable for all expenses XFS incurs to return the Equipment to such condition. IT IS SOLELY YOUR RESPONSIBILITY TO SECURE ANY SENSITIVE DATA AND PERMANENTLY DELETE SUCH DATA FROM THE INTERNAL MEDIA STORAGE PRIOR TO RETURNING THE EQUIPMENT TO XFS. YOU SHALL HOLD XFS HARMLESS FROM YOUR FAILURE TO SECURE AND PERMANENTLY DELETE ALL SUCH CUSTOMER DATA AS OUTLINED IN THIS SECTION.

7. Equipment Delivery and Maintenance. You should arrange with Supplier to have the Equipment delivered to you at the location(s) specified herein, and you agree to execute a Delivery & Acceptance Certificate at XFS's request (and confirm same via telephone and/or electronically) confirming when you have received, inspected and irrevocably accepted the Equipment, and authorize XFS to fund Supplier for the Equipment. If you fail to accept the Equipment, you shall no longer have any obligations hereunder; however, you remain liable for any Equipment purchase order or other contract issued on your behalf directly with Supplier. Equipment may not be moved to another physical location without XFS's prior written consent, which shall not be unreasonably withheld or delayed. You agree that you will not take the Equipment out of service during the Term. You shall permit XFS or its agent to inspect Equipment and any maintenance records relating thereto during your normal business hours upon reasonable notice. You represent you have entered into a Maintenance Agreement to maintain the Equipment in good working order in accordance with the manufacturer's maintenance guidelines and to provide you with Equipment supplies. You acknowledge that XFS is acting solely as an administrator for Supplier with respect to the billing and collecting of the charges under any Maintenance Agreement. XFS IS NOT LIABLE FOR ANY BREACH BY SUPPLIER OF ANY OF ITS OBLIGATIONS TO YOU, NOR WILL ANY OF YOUR OBLIGATIONS HEREUNDER BE MODIFIED, RELEASED OR EXCUSED BY ANY ALLEGED BREACH BY SUPPLIER.



MAINTENANCE AGREEMENT

ORDERPACKETID: 9032
Gary DelColle

-BILLING INFORMATION-

CONTACT NAME: Rawle Dummett
COMPANY NAME: Town Of Waterford
ADDRESS: 15 Rope Ferry Road
CITY: WATERFORD STATE: CT ZIP: 06385
EMAIL: rdummett@waterfordct.org

-METER INFORMATION-

METER CONTACT: Rawle Dummett
METER EMAIL: rdummett@waterfordct.org
METER PHONE: 860/440-0540

-SHIPPING INFORMATION-

CONTACT NAME: Rawle Dummett
COMPANY NAME: Town Of Waterford
ADDRESS: 15 Rope Ferry Road
CITY: WATERFORD STATE: CT ZIP: 06385
EMAIL: rdummett@waterfordct.org

-IT INFORMATION-

IT CONTACT:
IT PHONE:
IT EMAIL:

EQUIPMENT	MODEL	SERIAL
Xerox	C8045	

Maintenance and Supply

BASE CHARGE: see lease
BASE BILLED BY: CBS
A S Q M*
OVERAGES BILLED: \$ 006 06
A S Q M* BLACK COLOR BLACK COLOR
COMES PRINTS
BILLED BY: CBS
ADDITIONAL NOTES:
COPY MINIMUM REQUIRED ON ALL 45 PPM MODELS AND LOWER
**A PRINT: COPY IS DEFINED AS STANDARD 8.5" x 11"

CONTRACT DATE: TO:

FOR THE FIXED CHARGES THAT ARE SUBJECT TO THE TERMS SET FORTH IN THIS AGREEMENT, CONNECTICUT BUSINESS SYSTEMS' FIELD SERVICE DEPARTMENT WILL PROVIDE TECHNICAL REPAIR SERVICE IN ORDER TO MAINTAIN THE ABOVE "EQUIPMENT" IN PROPER OPERATING CONDITION.

MAINTENANCE AND SUPPLY AGREEMENT COVERS CONSUMABLE ITEMS: BLACK AND COLOR TONER, WASTE TONER, DEVELOPER AND FUSER OIL. THIS EXCLUDES PAPER AND STAPLES. A PER MONTH PER MACHINE SUPPLY DELIVERY CHARGE APPLIES.

CUSTOMER ACKNOWLEDGES TO HAVE READ AND UNDERSTANDS THE TERMS AND CONDITIONS OF THIS AGREEMENT WHICH ARE CONTAINED ON BOTH SIDES OF THIS DOCUMENT AND WHICH CONSTITUTES THE ENTIRE AGREEMENT BETWEEN BOTH PARTIES. THERE ARE NO ORAL UNDERSTANDINGS, TERMS OR CONDITIONS; AND THE PARTIES MAY NOT RELY UPON ANY REPRESENTATIONS, EXPRESSED OR IMPLIED, NOT CONTAINED IN THIS AGREEMENT. THIS AGREEMENT IS NOT VALID UNTIL ACCEPTED BY CONNECTICUT BUSINESS SYSTEMS, LLC.

ALL NETWORK EQUIPMENT PLACEMENTS WILL BE EQUIPPED WITH THE CBS 360 APP FOR METER COLLECTION AT NO CHARGE. IF THE CBS 360 APP IS NOT INSTALLED, YOU WILL AGREE TO AN ADDITIONAL FEE OF \$25 PER MONTH FOR METER COLLECTION.

☒ OPT IN TO THE CBS 360 APP FOR METER COLLECTION. BY INITIALING THIS BOX YOU AGREE TO HAVE THE CBS 360 APP INSTALLED.

SELLER: Connecticut Business Systems, LLC
ACCEPTED BY:
TITLE:
DATE:

CUSTOMER NAME: TOWN OF WATERFORD
ACCEPTED BY: Rawle Dummett
TITLE: Purchasing Agent
DATE: 11/20/19

* A = Annually S = Semi-annually Q = Quarterly M = Monthly

At this time, I decline Maintenance Agreement Coverage. Initials: